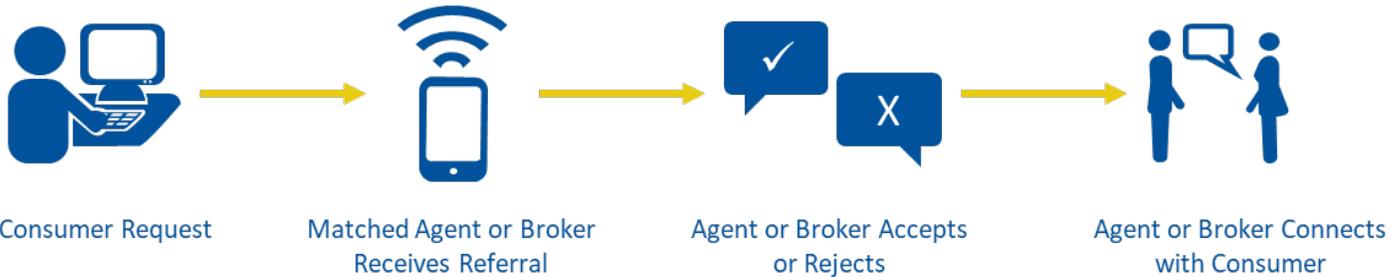




Help On Demand: Managing Referrals



What is Help On Demand?

Help On Demand is a consumer assistance referral system that connects consumers seeking assistance with Marketplace-registered, state-licensed agents and brokers in their area who can provide immediate assistance with Marketplace plans and enrollments. Only agents and brokers who have completed Marketplace training and registration are eligible to participate in Help On Demand.



Note: This is a Centers for Medicare & Medicaid Services (CMS)-contracted service developed and hosted by Help On Demand (formerly known as BigWave Systems). Help On Demand referrals are not provided by CMS or the Marketplace and they do not constitute an endorsement by the Department of Health & Human Services or the U.S. Government of the individual agents or brokers.

Receive Help On Demand Referrals: Consumer Safety Net

In addition to direct referrals, there is a very important Help On Demand feature that acts as a safety net for consumers so that their requests do not go unanswered, even after hours. If, for example, a consumer is on HealthCare.gov at 1:30 a.m. and requests assistance from an agent or broker via Help On Demand, it is possible that no agents or brokers in their area are currently set to **Available** in the system to answer their request.

- **Consumer Safety Net.** In these circumstances, Help On Demand will send an email to all Marketplace-registered agents and brokers licensed in the consumer's state who have registered to participate in Help On Demand, notifying them that a consumer is in need of assistance.
- **First Come/First Serve.** The first agent or broker to accept will receive the referral, and the referral will no longer be available to other agents or brokers in the state. If you receive one of these safety net emails, but you are not the first agent or broker to accept the referral in Help On Demand, you will not be able to access the consumer's information when you log into your Help On Demand account, due to privacy protocols.



Note: Help On Demand will send this notification via email, not a text message or an app notification. It does NOT mean that there is a problem with your availability settings, and you will not be penalized for failing to respond in a timely manner to safety net referrals sent outside of your designated availability.



Accept or Reject Help On Demand Referrals

To accept or reject Help On Demand referrals, log into Help On Demand at <https://Marketplace.HelpOnDemand.com> with your username and password. Once you log in, the **Manage Referrals** page will be displayed.

- You can view the consumer's city and state before accepting or rejecting the referral.
- To accept the referral, select **Accept** in the status column.
- Once you accept the referral, you will receive the consumer's name and contact information.

When you receive a referral notification, you must accept or reject it within 15 minutes. You will **not** be penalized for rejecting a referral if you are unavailable to provide assistance.

- Rejecting referrals when you are not able to assist ensures that consumers can quickly get the help they need.
- By selecting **Reject**, you are sending the referral to the next available agent or broker in the queue.
- This allows another available agent or broker to accept the referral and quickly connect with the consumer.

*It is important that you respond to notifications as quickly as possible, so we recommend that you select **Email & Text** or **Email & App Notification** as your preferred contact method in your Help On Demand profile. Receiving notifications via **Email Only** can cause delays and lost referrals.*

Referrals On

Manage Referrals | View Metrics | Export Metrics | Profile | Availability Settings

Search for Referrals by Status, Date-range or Name.

Status: all | First Name: First Name | Last Name: Last Name

From: [calendar icon] To: [calendar icon] Time Zone: Central Standard Time

Search

If you are experiencing issues, please contact Agent/Broker support at FFMProducer-AssisterHelpDesk@cms.hhs.gov

Name	Location / Contact	Date/Time Originated	Time to Accept / Time since last update	Referral Status
John Adams	Washington, District of Columbia, DC	06/17/2019 01:43 PM	13 mins	Accept Reject

Accept or Reject Help On Demand Referrals: Missed Referrals

If you miss the **15-minute window to accept or reject a referral**, the following banner will appear at the top of your Help On Demand account when you log in to inform you of the number of missed referrals in the last seven days:

Alert! You have missed 1 referral(s) in the last seven days. As a reminder, you must accept a referral within 15 minutes of receiving your notification. Missed referrals are sent to the next available Help On Demand agent or broker.

Referrals On

Manage Referrals | View Metrics | Export Metrics | Profile | Availability Settings

Search for Referrals by Status, Date-range or Name.

Status: all | First Name: First Name | Last Name: Last Name

From: [calendar icon] To: [calendar icon] Time Zone: Central Standard Time

Search

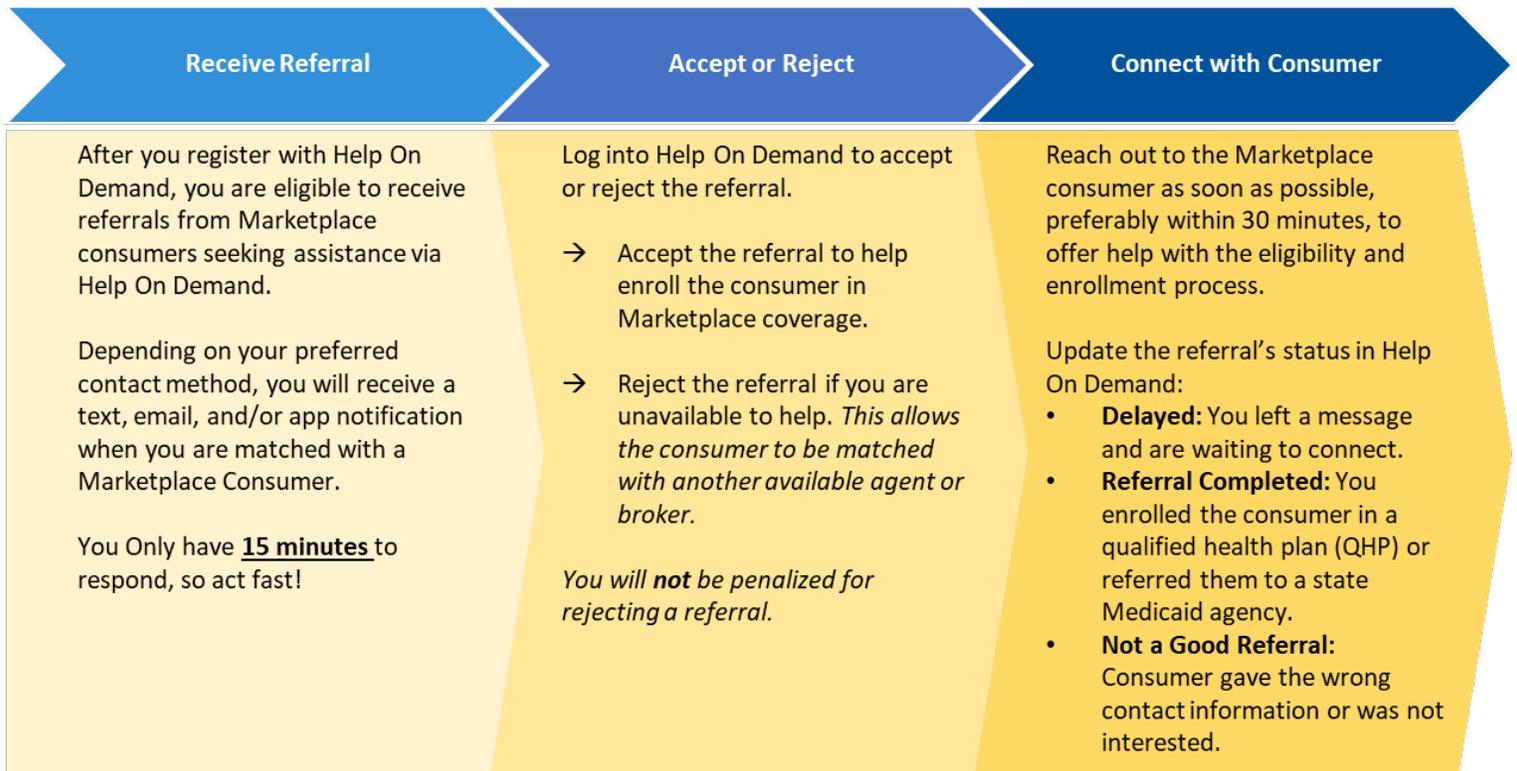


You will also be able to see your missed referrals in the **Manage Referrals** section of your account.

Name	Location / Contact	Date/Time Originated	Time to Accept / Time since last update	Referral Status
Missed Referral		05/03/2019 11:14 AM	a month	
Missed Referral		04/23/2019 03:30 PM	2 months	
Missed Referral		04/23/2019 03:42 PM	2 months	
Missed Referral		04/23/2019 11:47 AM	2 months	

When you log into Help On Demand you will be able to see how many referrals you have missed and when they were originally received. While you won't be able to see the consumers' contact information, you will be able to see how many referrals you missed, and when they were originally received. Under **Name**, you will see **Missed Referral**.

Manage Help On Demand Referrals





Manage Help On Demand Referrals: Update Referral Status

As you assist the consumer, be sure to update the status on the **Manage Referrals** page. Help On Demand has the following, simplified referral statuses for reporting and tracking:

- **Pending:** You have a referral that is ready to be accepted or rejected in Help On Demand.
- **Accepted:** You have accepted the referral in Help On Demand.
- **Rejected:** You have rejected the referral because you were not available to assist.
- **Delayed:** You are experiencing delays helping the consumer (e.g., left a message, waiting on eligibility determination).
- **Not a Good Referral:** You are unable to assist the consumer (e.g., provided incorrect contact information or is working with another broker).
- **Referral Completed:** You enrolled the consumer in a qualified health plan or referred them to a state Medicaid agency.

Once you have successfully assisted a consumer, it is important that you assign the **Referral Completed** status in Help On Demand. This indicates you have successfully completed your interaction with the consumer, who has either selected a QHP or has been referred to another entity for assistance. Also include the subcategory for the referral. Subcategories are:

- Selected a Marketplace QHP
- Referred to Medicaid
- Referred to Navigator/Assister
- Other



Note: If consumers are potentially eligible for Medicaid or the Children’s Health Insurance Program (CHIP), you are expected to help these consumers connect with the appropriate state agency to apply for this coverage.

Best Practices

Here are some useful guidelines to help you successfully manage Help On Demand referrals. **Please note that your Help On Demand account may be deactivated if you consistently fail to respond to consumer referrals in a timely manner.**

- **Respond Quickly.** Contact the consumer as soon as possible after accepting a referral. If you know that you are unable to promptly connect with a consumer, you should reject the referral so it can be reassigned to the next available agent or broker in the queue.
- **Reach out to the Consumer.** If a consumer does not respond to your initial phone call or email, CMS encourages you to make three attempts to connect with that consumer.
- **Update Referral Status.** We understand that sometimes the consumer cannot be reached or may have provided incorrect contact information. In that instance, you should select the **Not a Good Referral** status in Help On Demand.

To learn more about [Help On Demand](#), how to register, and what you need to know to receive consumer referrals, visit the [Help On Demand section of the Agents and Brokers Resources webpage](#).